



**MILLION DOLLAR TRADIE
SYSTEMS
BOOTCAMP 2017**



MILLION DOLLAR TRADIE SYSTEMS BOOTCAMP

Contents Page

HOW TO ATTEND A ONE DAY INTENSIVE.....
TIMELINE FOR THE DAY.....

MODULE 1. SYSTEMS MINDSET.....8

WHAT ARE YOUR BIGGEST SYSTEMS CHALLENGES? (EXERCISE).....
PROFITABLE TRADIE LADDER.....
WHAT IS A BUSINESS.....
THE E-MYTH.....
CREATE AN ASSET.....
WRITE IT DOWN.....
WORK HARD ONCE.....
AUTOMATION BEATS MOTIVATION.....
DEFAULT DIARY.....

MODULE 2. HOW TO SYSEMISE.....18

FLOWCHART YOUR PROCESS.....
DOCUMENT EACH STEP.....
KPI'S FOR PERFORMANCE.....
TOP 5 KPI'S (EXERCISE).....
TEST AND REVISE.....
A-Z OF OPERATIONS.....
SALES PROCESS FLOW CHART.....
SALES PROCESS STEPS.....
ENQUIRY SCRIPT.....
CLIENT QUESTIONNAIRE.....
TRADIE ON DECK FORM.....
SALES/SITE MEETING SCRIPT.....
QUOTE REQUEST FORM.....
TURNING QUOTES INTO SALES LETTERS.....
FOLLOW UP SCRIPT.....
CUSTOMER COURTESY CALL SCRIPT.....

MODULE 3. CLIENT OF THE QUARTER.....42

INTERVIEWS WITH THE 3 TOP CLIENTS FROM THE PAST 90 DAYS.....

MODULE 4. GUEST SPEAKER – RICHARD PRATLEY SIMPRO.....46

Contents Page

| | |
|---|------------|
| MODULE 5. OFFICE AND ONSITE SYSTEMS..... | 50 |
| CHOKE POINTS..... | |
| YOUR HOURLY RATE..... | |
| WHAT ARE WE CURRENTLY NOT DOING (EXERCISE)..... | |
| ADMIN MANUAL..... | |
| HIRING PROCESS..... | |
| QUALITIES NEEDED IN YOUR OFFICE TEAM? (EXERCISE)..... | |
| OUTSOURCING..... | |
| ONSITE SYSTEMS..... | |
| TASK ANALYSIS..... | |
| JOB DESCRIPTIONS..... | |
| DAILY, WEEKLY, MONTHLY AND YEARLY CHECKLISTS..... | |
| HIRING PROCESS..... | |
| TELEPHONE INTERVIEW..... | |
| INTERVIEW TEST..... | |
| PRE JOB CHECKLISTS..... | |
| QUALITY ASSURANCE CHECKLISTS..... | |
| INSPECTION CHECKLISTS..... | |
| MODULE 6. SYSTEMS HACKS..... | 76 |
| JOB MANAGEMENT SOFTWARE..... | |
| JING..... | |
| TRINT..... | |
| FIVERR..... | |
| CRM TEMPLATES..... | |
| WHAT'S ON REPORT..... | |
| DIARISE AND PLAN..... | |
| RULES OF THE GAME..... | |
| PERFORMANCE REVIEWS..... | |
| INCENTIVE PROGRAM..... | |
| MODULE 7. GUEST SPEAKER – MIKE ALLSOP..... | 88 |
| MODULE 8. BUILD YOUR PLAN..... | 92 |
| HIGHLY RECOMMENDED READING LIST..... | 101 |

How To Attend a One-Day Intensive

The average (growing) Plumber or Electrician spends \$958 a year on some form of self-improvement. Seminars, books, CD's, DVD's, Software systems or courses to make themselves better people and better business people, in short: to make more money.

Seminars and courses are the best opportunities because they're live performances. They offer "in your face" information that is timely—which makes you evaluate the information in terms of what you are doing "right now".

Business people go to live seminars eager to get more information, but few know how to attend for maximum benefit. Here are few guidelines and ideas I've compiled from both seminar leaders and seminar attendees - These tips will ensure you walk away with the gold:

1. Lower your sensitivity meter - or better yet, turn it off. You're here to get information not be offended by a remark or word.
2. Self-evaluate it, don't "I know it". When you hear a fact that will make you better, don't tell yourself "I know that" rather ask yourself, "how good am I at that?" Self-evaluation is the only way to get better.
3. Search for idea-gold. Look for what you don't know - not what you do know. Try to walk away with 6 things you can use tomorrow.
4. Listen with the intent to understand. Don't cut off the thought too soon. Stick with it...listen all the way out. Don't be smarter than the presenter - just listen with the intent to learn and get better.
5. Don't do it like they do it. Do it like you do it. Adapt the seminar leader's concepts and words to your personality and style.
6. Ask anything any time. Challenge anything any time. If you don't understand, ask why. Write down questions as they occur to you and ask them at the first appropriate moment.
7. All information won't work all of the time. So what? Pick out what WILL work and concentrate on that.
8. Take the general information and adapt it to your situation. Think, "how will this work in my business?" Try to adapt the principle as soon as you hear it.
9. Don't criticise the presenter - instead listen for the one or two gems that may impact you forever.
10. Your objective is to make yourself better. That's why you came in the first place. Don't strut what you already know. Find the "BFOs (Blinding Flashes of the Obvious)" and convert them to your world. Leave with new things that will help you, not the same information you came with.
11. Sit with someone you don't know -Stay away from the people you came with. Make new friends. Look for a potential new customer or contact.
12. Take great notes and record them at the end of the event. Too many times great ideas go fallow before they have a chance to be implemented. All great seminar ideas fall victim to the every day work that awaits you after the event. If you record your notes and listen to them every day for two weeks, you are more likely to do the things you would have put off for a month, maybe forever.

Today's Timeline

Million Dollar Tradie Systems Bootcamp
Friday 10th March 2017

9:00am

Systems Mindset

9:45am

How to Systemise

10:30am

Morning Tea

10:50am

Client of the Quarter

11:20am

Guest Speaker – Richard Pratley simPRO

12:20pm

Lunch

1:10pm

Office and Onsite Systems

2:20pm

System Hacks

3:00pm

Afternoon Tea

3:30pm

Guest Speaker – Mike Allsop

4:30pm

Building Your Plan

5.00pm

Finish – Snacks & Drinks

Notes

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 1 *Systems Mindset*



Systems Bootcamp

Notes

**Profitable Tradie
Ladder**



What Is A Business



The E- Myth



Create An Asset



Write It Down



Work Hard Once



**Automation Beats
Motivation**



Notes

Notes

A series of horizontal dashed lines spanning the width of the page, intended for writing notes.

Notes

Action Steps

Backburners

What Are Your Biggest Systems Challenges?

A series of horizontal dashed lines for writing.

Exercise

Default Diary Example

Scheduled in "wife / Family" time

Proactive Marketing Activity

Quadrant 2 activities would be better earlier in the week and earlier in the day

| Default diary | Monday | Tuesday | Wednesday | Thursday | Friday | Task |
|---------------|-------------------|-------------------|-------------------|---------------------------|----------------------|---------------------------|
| 7.00am | | | | | | |
| 8.00am | Team Meeting | Administration | In Office Pricing | Administration | Administration | Team Management |
| 9.00am | Administration | On Site Quoting | | On Site Customer Meetings | Health and Safety | Administration |
| 10.00am | In Office Pricing | | | | Gas Compliance | In Office Pricing |
| | | | | | | On Site Quoting |
| | | | | | | On Site Customer Meetings |
| | | | | | | Health and Safety |
| | | | | | | Gas Compliance |
| | | | | | | Business Development |
| | | | | | | Gym |
| | | | | | | Total |
| 1.00pm | Lunch | Lunch | Lunch with Nadine | Lunch | Business Development | 44 hrs |
| 2.00pm | In Office Pricing | In Office Pricing | In Office Pricing | On Site Quoting | | 44 hrs |
| 3.00pm | | | | | | 6 hr |
| 4.00pm | | | | | | 4 hr |
| 5.00pm | | | | | | 0 hr |
| | | | | | | 6 hr |
| | | | | | | 44.5 hrs |

could be more specific

Group site visits/ quoting together to reduce travel logistics & breaking up day

Default Diary Template

PROFITABLE
TRADIE.

Default Diary Template

| | Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|---------|-----|-----|-----|-----|-----|-----|-----|
| 6.00am | | | | | | | |
| 7.00 | | | | | | | |
| 8.00 | | | | | | | |
| 9.00 | | | | | | | |
| 10.00 | | | | | | | |
| 11.00 | | | | | | | |
| 12.00pm | | | | | | | |
| 1.00 | | | | | | | |
| 2.00 | | | | | | | |
| 3.00 | | | | | | | |
| 4.00 | | | | | | | |
| 5.00 | | | | | | | |
| 6.00 | | | | | | | |

THE MILLION DOLLAR TRADIE LADDER

SYMPTOMS

Freedom Time & Money. Exploring Other Ventures

Released...Almost. Struggling to Train the Team & System

Profitable but Burnout. Business Dependant on Owner. Lacking a Management Team

Steady but Stuck. Need Systems Both Onsite & in Office. Unreliable Sales & Marketing

Stressed & Keen to Grow. Managing Cash Flow. Staff Headaches

Excited but Overwhelmed. Needing a Plan

CRITICAL SUCCESS FACTORS

Employ a General Manager & Board of Directors. Grow Wealth Through Other Business Activities. Exit Strategies...

Provide Guidance to Management Team. Build Key Client Relationships.

Develop Management Team & System to Achieve Leverage.

Create Onsite Systems to Free up Time & Improve Quality of Work. Know your Numbers

Get More Work. Hire Staff. On The Tools

Manage Jobs & Own Projects



FREE TIME
(Entrepreneur)

MONEY TIME
(Investor)

OVER TIME
(Businessman)

FULL TIME
(Foreman)

PART TIME
(Tradesman)

SPARE TIME
(Homers)

PROFITABLE
TRADIE.

Specialist Business Training for Plumbers and Electricians

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 2 ***How to Systemise***



Systems Bootcamp

Notes



Flowchart Your Process



Document Each Step



KPI's For Performance



Test And Revise

Notes

Ruled area for taking notes, consisting of 32 horizontal dashed lines.

Action Steps

Backburners

KPI's Selector

Marketing & Sales

Financial

Operation/ Production

People

Suppliers

Innovation

| | | | | | |
|---|---|--|---|---|--|
| <ol style="list-style-type: none"> Market share Leads by source Number of prospects Conversion rate Average \$ sales Profit per customer Numbers of transactions per customer Customer satisfaction Number of new customer Brand awareness Number of customers Referrals Sales mix Customer profitability Number of orders Customer retention Lifetime value of a customer Click-through-rates Bounce rate | <ol style="list-style-type: none"> Revenue Profit Margin Gross margin Revenue/Expense ratio Days sales outstanding Return on investment Cash in bank Cost of goods sold Inventory turns per year Cash Flow Return on capital Bank overdraft Inventory Aged accounts payable EBITDA Capital expenditure Debt to equity ratio Training expenditure Marketing expenditure Current liabilities Interest expenses Bad debts Overhead recovery | <ol style="list-style-type: none"> Number of employees Capacity utilisation Safety, e.g.. days lost or comp claims Back orders Costs Re-work (#, %) Response time Quality data Timeliness Post Sale Warranty claims (#,%) Repairs Returns Defects No. of complaints Value of customer complaints Work in Progress Labour hours Overtime Overnight Downtime Maintenance costs Labour Utilisation | <ol style="list-style-type: none"> Number of employees Number of Managers Manager/ Employee ratio Absenteeism Number new employees Hours training per employee S training per employee Cost per new hire % employees fully trained Employee turnover Employee satisfaction Output per employee Sales Productivity Quality of output Drivers of capabilities Learning Skills matrix Core values Customer focus Innovation Profit per tradesmen | <p><u>Satisfaction with suppliers</u></p> <ol style="list-style-type: none"> Responsiveness Costs compared to competition On-time delivery Overall satisfaction/ value Defects (#,%) Credit terms Number of suppliers <p><u>Supplier Satisfaction</u></p> <ol style="list-style-type: none"> Opportunity for profits while providing quality Responsiveness Payment | <ol style="list-style-type: none"> Revenue from new products Revenue from new market segments Revenue from new geography Number of new customers Time to market for new products Time to market for new services |
|---|---|--|---|---|--|

The Top 5 KPI's

1.

2.

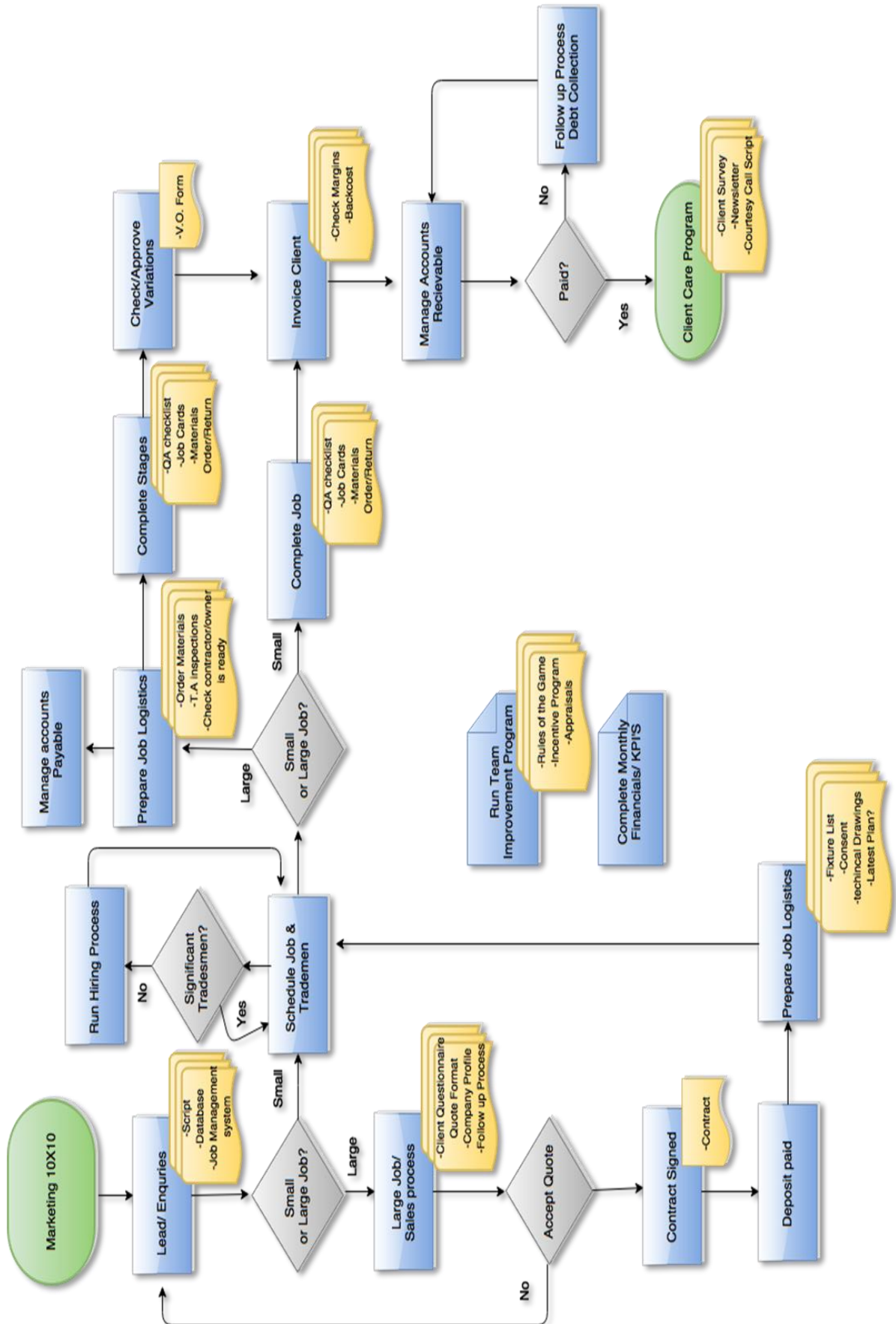
3.

4.

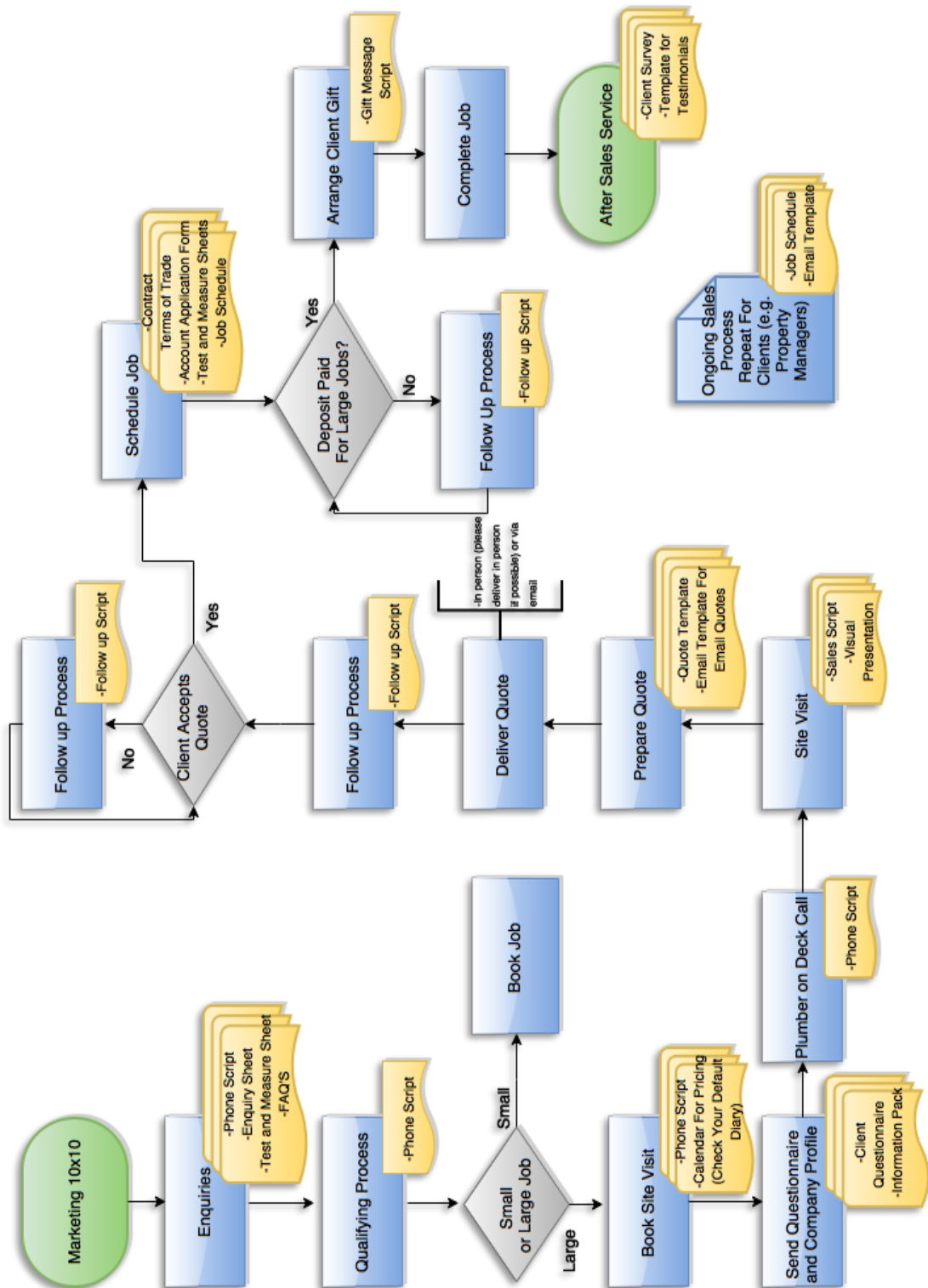
5.

Exercise

A-Z Of Operations



Sales Process Flow Chart



Sales Process Steps

**PROFITABLE
TRADIE.**

Tradies Sales Process

| Task | Paper Work / Script | Who | Done |
|---|--|---|------|
| 1. Marketing 10 x 10 (Website, Ad Words, Direct Mail, Yellow Pages etc.) | Marketing Collateral | Marketing Assistant | |
| 2. Receive Enquiry (Phone, Email) | Phone Script Enquiry Sheet Test and Measure Sheet Frequently Asked Questions List | Administrator / Receptionist | |
| 3. Qualify Prospects | Phone Script | Administrator / Receptionist | |
| 4. Book Job if small maintenance job or repair. Book site visit if enquiry requires quote or site visit Note: if large job (eg. Bathroom / Kitchen, Renovation or new build make appointment for 5 working days) | Phone Script Calendar for Pricing / Sales Person (check your Default Dairy) | Administrator / Receptionist | |
| 5. Send questionnaire via email (only to large jobs) | Client Questionnaire | Administrator / Receptionist | |
| 6. Send Company Profile / Information Pack via Courier (only to large jobs) | Information Pack | Administrator / Receptionist | |
| 7. Plumber of Deck Call (only for large jobs) | Phone Script – Plumber on Deck | Pricing / Sales Person | |
| 8. Site Visit | Sales Script Visual Sales Presentation | Pricing / Sales Person | |
| 9. Prepare Quote | | Pricing / Sales Person | |
| 10. Deliver Quote | Quote template (Action Plan) Hand deliver Large Job Quotes (will increase conversion rate) Email template for email quotes | Pricing / Sales Person Administrator / Receptionist | |

Sales Process Steps

**PROFITABLE
TRADIE.**

| | | | |
|-----|--|---|------------------------------|
| 11. | Follow Up Quote (same day for email quotes to ensure quote is received) <u>Note:</u> Continue to follow up 3 days after quote is delivered and then every 7 days until you get a yes or a no (and you know why it was a no) | Follow Up Scripts | Administrator / Receptionist |
| 12. | Client accepts quote / orders the work Deposit paid for large jobs | Contract Terms of trade Account application form Test & Measure Sheets Job Schedule | Administrator / Receptionist |
| 13. | Arrange Client Gift (for large job only) | Gift with message script | Administrator / Receptionist |
| 14. | Complete the job | | |
| 15. | After Sales Service (complete within 2 days of job being completed) | After Sales Service Phone Script <ul style="list-style-type: none"> • Client Survey • Template for Testimonials | Administrator / Receptionist |
| 16. | Ongoing Sales Process for Repeat Clients (e.g. Property Managers) | Job Schedule Email Template | Administrator / Receptionist |

Enquiry Script

PROFITABLE TRADIE.

Enquiry Script / Sheet

☺ SMILE BEFORE PICKING UP RECEIVER

Job Enquiry Form

Date: / /

Time: _____

**Good Morning/Afternoon XYZ Plumbing, you're speaking with
Just so I can help you best can I ask you a few questions...?**

Have you worked with us before?

NO - NEW CUSTOMER

YES - RECORD AS EXISTING CUSTOMER

Can I get some details please?

Can I Confirm your details?

Name: _____

Business?: _____ Multiple Properties? Y / N

Address: _____

Ph: _____

Mobile: _____

Email: _____

What can we help you with? (get as much details as possible.) (Refer to FAQ's if necessary)

(Check in schedule and book a suitable time for the job or onsite visit (5 days min for large jobs -> see script for large jobs)

Date: _____ Time: _____ Who: _____ (enter into SmartTrade/Simpro/Fergus etc)

Can I ask how you heard about us?

| | | | | |
|---|--|---|--|--|
| <input type="checkbox"/> Yellow Pages (Book) | <input type="checkbox"/> Website | <input type="checkbox"/> Local PC Phone Book Ad | <input type="checkbox"/> Auck Wide Website | <input type="checkbox"/> Existing Customer |
| <input type="checkbox"/> Yellow Pages (Website) | <input type="checkbox"/> Manukau Papakura Phone Book | <input type="checkbox"/> White Pages | <input type="checkbox"/> Referral * | <input type="checkbox"/> Other * |

* Details: _____

(If not an Account Holder) How would you like to pay? We have 2 options

Open an Account _____ or credit card _____

Visa/Mastercard Card # _____ Name on Card _____

Enquiry Script

PROFITABLE TRADIE.

If Open an Account Holder "Cool, the account holder must be home when our Tradesmen comes around so they can complete the application form. Is that OK?

Our service fee is \$165 plus GST and that covers us coming to site + the first 45 minutes. Are you OK with that?

If a Big Job...

The next step is to schedule an onsite meeting with our Pricing Manager/Estimator John. (*name*), John has the current appointments available (*pre-determined dates min 5 days out*) Thursday, 15th July 10.30 am or Friday 16th July 11.30am, what time works best for you?

Appointment written down

In this meeting he will:

1. Explain a bit more how XYZ Plumbers works
2. Inspect and review existing structure and site conditions.
3. Discuss any issues from site observations and what you want to achieve.
4. Discuss your budget expectations so he can give you the most appropriate solutions and an action plan to achieve your requirements.

Great it's important that all those involved in making decisions regarding the project attend.

I am going to send you out an information pack and a questionnaire, what is the best address to send it to John? I'll also email the questionnaire and confirmation of appointment, is (address given) the best one to send that too?

Thanks, John will give you a call once we have received your questionnaire to discuss your project further. What is the best number to contact you on?.....

Close...

Great (name) just to confirm, John will be at your place on Thursday 15th July 10.30am at 123 Brown Rd. (or John will see you on _____)

Is there anything else I can help you with?

End on a high Thanks so much for your call, bye for now

FAQ'S For Enquiry Script

PROFITABLE
TRADIE.

Frequently Asked Questions for Handling Enquiries

The purpose of the question handling scripts is to give you ready made answers to deal with tricky questions so you have the best opportunity of making an appointment.

Below are listed a series of common “tricky questions” with suggested responses. Take 30 minute out and brainstorm the top five questions you get asked and then record the answers you give. Make sure your team has these questions at their fingertips. This can save you hours of phone work!

So how much does it cost or what is your hourly rate?

The key here is to never give the hourly rate or cost over the phone as these callers are simply ringing around (price shoppers) and we are unlikely to hear back from them. The best response is to give a price range and then look to book the appointment on site.

An example:

Caller: So how much does it cost to get a hot water cylinder replaced?

(Name) we are happy to give you a price. The price will range from \$900 to \$2000 and it depends on what sort and size of cylinder you would like and how easy the access is for us to do when we get to your place. How does that sound to you? Great, what I suggest is we book a time for one of our tradesmen to come and do the job (or to give you a firm quote). (Name of Tradesmen / or salesperson) is available on Tuesday afternoon or Wednesday morning. What time would work best for you?

Can you give me a quote?

It takes too much time to do a quote for the small jobs. We give an estimate (range of price) over the phone and then look to book the appointment on site.

An example:

Caller: I would like you to do a quote please?

Yes we are happy to give you an estimate over the phone. Based on what you have told me the job would range from \$200-\$350 but we won't know the exact cost until we get on site and see what the situation is. How does that sound to you? Great, what I suggest is we book a time for one of our tradesman to come and do the job. (Name of Tradesmen) is available on Tuesday afternoon or Wednesday morning. What time would work best for you?

FAQ'S For Enquiry Script

PROFITABLE TRADIE.

The caller asks a question that you cannot answer

The key here is to ensure you get the contact details and as much information about the problem as possible. Then we can either book a tradesmen to visit or call back when we have found the information we require.

An example

Caller asks a question you don't know the answer too.

Ok (Name). What can you tell me about the problem? Let the caller explain and ask questions if necessary (e.g. how long has this been going on? Have you had any work done recently? How old is the piece of equipment? Etc.).

Ok (Name). It sounds like it could be (this) or possibly (that).

What I suggest is we book a time for one of our tradesman to come and have a look and fix the problem. (Name of Tradesmen) is available on Tuesday afternoon or Wednesday morning. What time would work best for you?

Or

(Name), I'll have a get some more information on that and I'll give you a call back shortly.

Client Questionnaire

PROFITABLE
TRADIE.

XYZ Tradies

We're on Time and On Budget every time...Guaranteed!

Please fill out the questionnaire below, this will help us provide you with the best advice applicable to your project.

Personal details:

Name:

Address:

Phone:

Email:

Occupation:

Date of Birth:

About your project

Are you the legal owner or the property? Y/N

What type of work are you wanting done? New Home Bathroom Kitchen Solar Other

When do you want the project completed? _____

Have all the consents been approved? Y/N

What range of budget are you hoping to complete the project with? \$_____ to \$_____

Do you have finance approved / available? Y/N

Have you selected: Colors Y/N Products and fitting Y/N

Please indicate your priorities when choosing a contractor:

Communication Reliability Experience Service Quality

Cost 60 days FREE maintenance after completion

Can our experience and advice help you with:

Layout Kitchen/Bathroom design Colors Products/fittings Building Work

Would you like to purchase any items for your home yourselves? Y/N

Email: enquiries@xyztradies.co.nz

Phone: 897 1234 Fax: 897 1235

website: www.xyztradies.co.nz

Tradie On Deck Form

PROFITABLE
TRADIE.

Tradie on Deck Script

Hi (Name), it's (name of Director) from XYZ Tradie here, just following up about your inquiry.

Have you read our information pack? Yes, (if no explain it to them)

Thank you for filling out the questionnaire so well, I noticed on the questionnaire you mentioned...

Dig for pain, how do you feel about that? We had a similar situation, what we did was... etc.

At this meeting I would like to discuss with you your plans and ideas for your home and also run through your priorities with this project.

Outline how the meeting will be run

- A – The result you want to achieve
- B – Go through your plans
- C – Look at your budget and ascertain the best plan to help you achieve your project goals
- D – Work out the next steps and if we are a good fit...

Do you have any questions for me?

After questions are answered



Great, I look forward to meeting with you and (include names of others attending the meeting.)

Thanks (name), bye for now.

Sales / Site Meeting Script

**PROFITABLE
TRADIE.**

| | | |
|---|---|---|
| <p>Rapport Hi _____ this is _____ from XYZ Plumbing. How are you? (Big Smile)</p> <ul style="list-style-type: none"> • Best place to park my ute? • Business Card • Build rapport with small talk – weather, sports, news, photos etc. <p>Check Decision Makers</p> | <p>Agenda (take control) Is there somewhere we can sit and talk? Is it OK if I outline how we'll go through things today?</p> <ol style="list-style-type: none"> 1. Result— what are you wanting to achieve — the outcome? 2. Reality — What is the situation now 3. Road Blocks — anything stopping you getting started? 4. How can we help? 5. The next steps from here... | <p>Decision (why now & why me?)</p> <ul style="list-style-type: none"> • Why is now a good time to look at this? • What made you call us? |
| <p>Result</p> <ol style="list-style-type: none"> 1. How will your home/property/project look when it's finished? 2. What will that give you? 3. How will it help your family/lifestyle/property? 4. 5 key questions <ul style="list-style-type: none"> - What is your #1 priority? - Why did you choose that one? - Is it that important to you? - What would be the consequences of not sorting this? - Would that worry you? | <p>Reality</p> <ol style="list-style-type: none"> 1. What are you not happy with now? 2. How is this affecting you/family/property /bank accounts etc.? 3. Walk through the house/site & inspect/measure up | <p>Road Blocks So what are the things that are slowing you down from getting you what you want?</p> <ol style="list-style-type: none"> 1. Finance 2. Plans 3. Consents 4. Options 5. What is the budget <p>Later or Sooner? Making Sense? Comfortable so far?</p> <p>Shoot Silver Bullets (give suggestions & options)</p> <p>Temperature Check</p> |
| <p>Value Okay, so let me make sure I have this right... [RESULT, REALITY, ROADBLOCKS]... Did I miss anything?</p> <p>Sit back down, go through your solution (company details)</p> <ul style="list-style-type: none"> - Problems with Plumbers - Testimonials - Before and After pictures - Company Values - Guarantees | <p>Question Loop Comfortable? Make sense? Where To?</p> <p>Problems. It sounds like the big problems to solve are... (3 question loop)</p> <p>Solutions. You need _____ (got through the solutions)</p> <ol style="list-style-type: none"> 1. Reconfirm budget 2. Reconfirm timelines 3. Give estimate/quote onsite if possible <p>Promise. We help _____ with _____ to _____. Add your clearest benefit for them (3 Question loop)</p> | <p>Magic Pills The next steps are...</p> <ol style="list-style-type: none"> 1. Book in job if appropriate 2. Draw up Plans/Consents 3. Put a price together and get that back to you by _____ <p>Ok, great to meet you — if you have any questions please give me a call us. I look forward to talking soon & getting your project sorted for you (assume the sale)</p> |

Quote Request Form

Roofing and Spouting

Description of work to be done

Draw a picture of what needs to be done...

Brand or make of spouting required?

Dimensions of box gutturing?

Hire Equipment

Yes No

Description

•

•

How many levels is their house? 1 2 3 4 levels

How old do you think their house is? (5 years or less) (5 - 15 years) (more than 15 years)

Would it be difficult to clean their spouting? Yes No

Subcontractors required

Do we need to get a quote? Yes / No

1. Builder Yes / No
2. Electrician Yes / No
3. Gasfitter Yes / No
4. Draylayer Yes / No
5. Digger and driver Yes / No
6. Concrete cutting Yes / No
7. Concrete drilling Yes / No
8. Demolition Yes / No
9. Labour Hire workers Yes / No
10. Scaffolding Yes / No

Bathrooms

Description of plumbing work to be done

Existing bathroom layout

New bathroom layout

Will the fixtures remain in existing positions Yes No

Will the fixtures be upgraded with new products Yes No

How many fixtures were there in the existing bathroom

How many will there be now in the new bathroom

Do we need to provide a quote to supply the new fixtures Yes No

What type will the new fixtures be?

- Basin mixer
- Basin
- Bath tap ware
- Bath
- Other
- Shower mixer
- Shower slide set
- Shower
- Toilet roll holder
- Toilet
- Vanity taps
- Vanity?

Gas

Do they have gas in the house? Yes No

Do they need a gasfitter to quote on any work? Yes No

Do they currently have any form of heating? Yes No

Do they have a heat pump? Yes No

Quote Request Form

Quote Request Form

Customer Plumber

Address Job #

Phone number Date

(The highlighted grey section must be completed for every job...)

Hot water cylinders

Description of plumbing work to be done

What type is the existing HWC? LP MP

What will the new cylinder be? LP MP

Model

Liters

Dimensions

What new valves will it require?

- MP combo set Yes No RMCCOM75H
- Pressure relief valve Yes No 3.7 7.6 NEFAF.....
- Pressure reducing valve Yes No 3.7 7.6 NEFAF.....
- 3 in 1 valve Yes No NEFA3IN1
- Low pressure Tempering valve Yes No RMCTVA1003HF
- Cold water expansion valve Yes No RMCH50.700
- Ball valve 15mm Yes No BVTHMF15
- Ball valve 20mm Yes No BVTHMF20

Will the drain need upgrading Yes No

Will it require seismic restraints Yes No

Will it require new pipe work Yes No

Do they want us to take away the old cylinder and valves? Yes No

Do we require an electrician to reconnect the wiring? Yes No

Did you leave them one of our heat pump HWC brochures Yes No

Kitchen and Laundries

Description of plumbing work to be done

| | |
|-----------------|------------|
| Existing layout | New layout |
|-----------------|------------|

Will the fixtures remain in existing positions Yes No

Will the fixtures be upgraded with new products Yes No

How many fixtures were there in the existing bathroom

How many will there be now in the new bathroom

Do we need to provide a quote to supply the new fixtures Yes No

What type will the new fixtures be?

- Kitchen mixer
- Tub
- Water filter

Do they have the following fixtures in their kitchen?

- Instant hot and cold tap Yes No
- Waste disposal unit Yes No
- Water purifier or filter Yes No

(The highlighted grey section must be completed for every job...)

Travel

How many trips will be required?

Labour

Hours required to complete job?

Do you need an apprentice? Yes No

How many hours required for the apprentice?

Plumber

Plumber who completed quote?

Date 2009

Turning Quotes Into Sales Letters

PROFITABLE
TRADIE.

Action Plan

Quotation Date:

Attn: xxxxxxxx Fax: xxxxx

Dear James,

I've noticed that other Plumbing companies tend to just do a 'quote' —that is they give you a price and that's all, as if price is the only thing worth considering when planning your next project.

If all Plumbing projects were the same, that'd be true.

In reality, there are massive differences — things that matter — like quality of materials, how much planning will be required, help with the council, organising the plans, choosing the right materials and critically how many years will the work last you.

Not to mention the important differences between Plumbing companies; like whether they use qualified and experienced tradespeople to complete your project, will they deliver exactly the features they say they will, whether they offer a guarantee, how they manage the sub trades, will they help you to work out a budget and timeline that meets your needs, are they a Master Plumber, and can they give you unbiased professional advice to get the best result for you.

That's why we have included a comprehensive "XYZ Welcome Pack" to give you all the information you Should consider when planning your next project.

Think seriously about what you want from your Plumbing Company. Whilst "what's the price?" is definitely an important question, here are a few others worth asking.

1. Will your Plumber promise that every aspect of their work will represent quality workmanship and offer to fix any problems within 48 hours at no charge?
2. Do they run all their projects through an 87-point quality check?
3. Do they inspect all their projects to ensure they are safe, legal and conform to Australian/New Zealand standards?
4. Will they offer a 7 point extensive guarantee?
5. Do they have an open site policy?
6. Do they provide on-going regular communication keeping you updated regularly with how your project is progressing?
7. Will they give you a firm start/completion time and be honest about their progress?
8. Can your Plumbing company offer 49 references from delighted past customers?
9. Does their point-man have over 32 years of experience in the Plumbing industry ensuring you get the best advice available?

Of course I wouldn't be drawing this to your attention if XYZ Plumbing didn't fulfil all of the above criteria (and much more....).

XYZ Plumbing also offers an unbeatable 7-point guarantee: Firstly, you receive a full Master Plumbers guarantee. Secondly, 'No hidden surprises' guarantee. Thirdly, we promise you the very best service and advice.

So if you are convinced and think (like so many of our satisfied customers) that we are the right Plumbing Company for your project, or want to discuss in further detail then call me, Joe Blog today on 0800 Plumb.

Sincerely

Joe Blog

Follow Up Script After Submitting A Quote

PROFITABLE
TRADIE.

Follow Up Script – After Submitting a Quote

Never, never, never underestimate the power of follow up! The key is to be persistent but in a humorous, light hearted manner. Humour is the best way to “unlock” the client and to keep them on-side. Your clients will respect you for your business savvy and most competitors will not follow up. Here’s how to approach the follow up.

- 1. Call the decision maker the day after delivering the quote (this way you can at least be assured they will look at your quote / tender and you are “on their mind”).** Here is what you can say.
“Hi is that (John). Great! It’s (your name from your business) speaking. Look (John) I was just calling to confirm that you received our quote. (Yes, No) Have you had a chance to read through it? Great! Did you have any questions about our solution? (Answer as appropriate) Great...John we’re pretty busy at the moment but we have some space early next week where we could fit your job in...would like us to book you in? If yes, book job. If no - Well if you need anything else from us please let me know. I’ll give you a call in a few days to see how things are going.”
- 2. Call the decision maker three days later after the first call.** Here is what you can say.
“Hi is that (John). Great! (your name from your business) here. John, we’ve been waiting for you call to get started on the (house, project etc) but since we haven’t heard I thought you must have lost my number (ha ha) (seriously again) So how are you going with the quote? So what do we need to do to get this job underway for you? (Try to find out they reason for not deciding yet. Then you can offer suggestions to help.) If still undecided – I’ll give you guys a bell in a weeks’ time and see how you are getting on.
- 3. Keep calling the decision maker every 7 days until the contract is awarded.** Use variations of the number 2 script.

Customer Courtesy Call Script

PROFITABLE
TRADIE.

Courtesy Customer Service Call Script.

Hi is that **NAME**.

It's Tony from **X Y Z plumbing** here.

We recently completed a job at your house where we **changed NAME OF JOB**.

This is just a quick courtesy call. Have you got a few minutes to chat?

How did you find our service?

Great!

Is there anything that we could improve on?

Fantastic, I really appreciate your feedback. It really helps us do a better job next time.

Name as part of our service our technician **Mike (name of employee)** did our 29 point plumbing inspection and he found there was a couple of things that you might want to know about.

List of inspection outcomes

Would you like us to fix those for you or put a quote together to get them fixed?

- Yes.
- no.

Great.

And then make the arrangements.

Awesome. **Name**. We really appreciate your business and we look forward to helping you again in the future.

Thanks a lot.

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 3 ***Client of the Quarter***



CLIENT
— OF THE —
QUARTER

Systems Bootcamp

Notes

A series of horizontal dashed lines for taking notes.

Notes

A series of horizontal dashed lines spanning the width of the page, providing a template for handwritten notes. There are 20 dashed lines in total, evenly spaced from the top header to the footer.

Notes

Handwriting practice lines consisting of a solid top line, a dashed midline, and a solid bottom line, repeated across the page for note-taking.

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 4

Guest Speaker – Richard Pratley
simPRO Software



Systems Bootcamp

Notes

Notes

A series of horizontal dashed lines providing space for writing notes.

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 5 ***Office and Onsite Systems***



Systems Bootcamp

Notes



Choke Points



Systemise & Delegate



Admin Manual



Hiring Process



Outsourcing

Notes

Action Steps

Backburners

Task Analysis

Task Analysis

| | | | |
|---|--|--|--|
| <input type="checkbox"/> Get mail | <input type="checkbox"/> Staff/social events | <input type="checkbox"/> Debt collection | <input type="checkbox"/> Clarifying jobs and book in against the correct job |
| <input type="checkbox"/> Answer phone/enquiry scripts | <input type="checkbox"/> Provide admin & logistics support to director | <input type="checkbox"/> Time-sheets, wages, smart payroll and GPS reports | <input type="checkbox"/> IT improvements |
| <input type="checkbox"/> Schedule jobs | <input type="checkbox"/> Newsletter | <input type="checkbox"/> ACC | <input type="checkbox"/> New client creation |
| <input type="checkbox"/> Bank reconciliation | <input type="checkbox"/> Client events | <input type="checkbox"/> Stationary shopping | <input type="checkbox"/> Accountability tracking |
| <input type="checkbox"/> Check payments | <input type="checkbox"/> What's on report | <input type="checkbox"/> Mail incoming & out going | <input type="checkbox"/> Chasing Wholesalers invoices and credits |
| <input type="checkbox"/> PAYE | <input type="checkbox"/> Customer care – birthdays etc. | <input type="checkbox"/> Filing | <input type="checkbox"/> Stock reports |
| <input type="checkbox"/> GST | <input type="checkbox"/> Social media | <input type="checkbox"/> Phone calls in and out | <input type="checkbox"/> Importing x3 wholesalers |
| <input type="checkbox"/> Tax Payments | <input type="checkbox"/> Direct mail – logistics | <input type="checkbox"/> Updating insurances and claims | <input type="checkbox"/> IT Faults on mobile devices |
| <input type="checkbox"/> Load Payments | <input type="checkbox"/> Follow up quotes | <input type="checkbox"/> Booking of jobs and diary | <input type="checkbox"/> Client file updating |
| <input type="checkbox"/> Monthly Profit & loss | <input type="checkbox"/> Add content to website | <input type="checkbox"/> Stock allocation and ordering | <input type="checkbox"/> Client interruptions, rep's, couriers and family |
| <input type="checkbox"/> Accounts Receivable | <input type="checkbox"/> Adwords | <input type="checkbox"/> Liaise with account | <input type="checkbox"/> Banking cheque's at bank |
| <input type="checkbox"/> Customer care | <input type="checkbox"/> Get client lists | <input type="checkbox"/> Create invoices & send | <input type="checkbox"/> Updating devices and setup |
| <input type="checkbox"/> Follow up on completed jobs | <input type="checkbox"/> Customer database | <input type="checkbox"/> Power accounts (Genesis and Delta) | <input type="checkbox"/> Payable's/ accounts |
| <input type="checkbox"/> Monthly KPI's | <input type="checkbox"/> Document shredding | <input type="checkbox"/> Certificate of compliance's | <input type="checkbox"/> Setup trade accounts |
| <input type="checkbox"/> Stationary orders | <input type="checkbox"/> Check drop box (Mail box on outside of office for staff to leave any paperwork) | <input type="checkbox"/> Scan and repeat | <input type="checkbox"/> Receive order numbers from clients |
| <input type="checkbox"/> Annual Accounts | <input type="checkbox"/> Health and Safety | <input type="checkbox"/> Training | <input type="checkbox"/> Build and send electrical reports |
| <input type="checkbox"/> Clean office | <input type="checkbox"/> Queries to suppliers | <input type="checkbox"/> Toolbox meetings | |
| <input type="checkbox"/> Manage vehicle fleet/maintenance | <input type="checkbox"/> Check emails, responding and removing | <input type="checkbox"/> Chasing staff for receipts | |

What Are We Currently Not Doing?

A series of horizontal dashed lines for writing.

Exercise

Job Descriptions

PROFITABLE
TRADIE.

XYZ Plumbing - Job Description - Office Assistant

Overview: -

We are excited about providing the highest quality service in all our plumbing and drainlaying, solar and gas fitting projects from maintenance work through to construction.

We aim to employ only the most highly motivated team members where the overall quality and pride in our work are the key factors to providing this service.

Position Overview: -

- Position Status: Office Assistant.
- Reporting Relationships: Director/Owners - Frank and Debra Thomas, Office Manager - Maree Greely, Supervising Project Manager - Jared Stevens
- Liaise with: Office staff and other team members and clients.
- Expected hours of work: 8.30 - 5pm. A lunch break will be taken at 12.30 or 1.00pm for thirty minutes.
- Expected Contract Rate: Negotiable, dependent upon demonstrated ability and previous experience.

Role: -

To assist the Director/Owners, Office Manager in ensuring allocated office activities are completed in a timely, accurate and professional manner.

Responsibilities: -

1. Turn up to work at the correct time taking lunch breaks, (as above), to be staggered with Office Manager to ensure phones continue to be answered.
2. Be well presented in regard to clothing and personal grooming at all times.
3. Be polite, courteous and friendly at all times.
4. Carry out all work as instructed by the Office Manager, Director/Owners and/or Project Manager in the expected time frame.
5. Make sure that your site is safe at all times, (according to OSH regulations).
6. It is expected that you will abide by the 'House Rules' and the 'Rules of the Game' of XYZ Plumbing.
7. Have fun, enjoy and be proud of what you achieve in your working day.
8. If you need time off, then you must give 2 weeks' notice minimum to your Manager. (Acceptance of leave is at the discretion of the Director)

Job Descriptions



9. If you are sick, contact your Director before 7.30am.
10. You are encouraged to participate in team meetings and contribute to the overall team spirit. Your input, ideas and openness is encouraged and valued.
11. Be willing to share expertise with other staff members.
12. Answer the phone, if away from the phone, let the Office Manager know.
13. Working as part of a team, scheduling jobs for the maintenance tradespeople.
14. Assist with marketing activities (e.g. Mailing letters, customer database etc.)
15. Filing.
16. Processing the mail, (as per Receiving and Opening Mail Procedure), and banking of cheques.
17. Attend to email and website enquires as directed.
18. Management of credits back to suppliers.
19. Documentation of procedures under your jurisdiction.
20. Processing and management of Supplier Invoices, including importing.
21. Dealing with emails from Classic Builders re SSR's.
22. Invoicing of Classic Builders jobs.
23. Invoicing of 'other quoted jobs', e.g. Ultimate Homes.
24. Management of Asbuilts, scanning. Preparation of Drainage paperwork and duplication of job.
25. Fridays – Preparation of paper work for jobs the following week.
26. Creation of new jobs in Fergus.
27. Creation and management of purchase orders.
28. Management of Vehicle Database.

Key Performance Indicators: -

1. Purchase orders created daily.
2. Communicating effectively (in both articulation and listening), with the Office Manager, Managing Director/Owners and Project Manager to highlight any potential problems or concerns with staff, workload, quality or client relations.
3. Be punctual on arrival to and from work. You will provide a high level of Customer Service at all times.
4. The ability to demonstrate a willingness to share expertise.
5. Tasks completed in timely and accurate manner.
6. Job folders up to date, both physical and electronic.
7. All relevant invoicing is up to date.

Job Descriptions



Personal Attributes and Qualifications: -

- Extremely ambitious with the drive and commitment to succeed.
- Passionate and committed to contributing to excellence in the business.
- Highly motivated and focused.
- Is able to delight customers by exceeding expectations.
- Attention to detail.
- Naturally shows initiative and is solution focused.
- Well-presented and articulate.
- No criminal convictions.
- A team player.
- Be able to follow systems and processes to ensure the highest quality of work on time.
- Experience using XERO and Fergus (or similar accounting and trade management software).
- Willingness to share expertise and help others.
- High standard of communication skills, including and not limited to listening skills.
- Able to deal with change in an open minded and enthusiastic manner.
- Strictly limits time on personal phone calls and/or texts. No personal Social Media during working hours.
- Adheres to JT Plumbing Policies and Procedures and contributes to the creation and maintenance of them.

Office Manager Daily / Weekly / Monthly Task List

Daily & Weekly Checklist

| Monday | Tuesday | Wednesday | Thursday | Friday |
|--|--|--|--|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Check Dropbox <input type="checkbox"/> Check Emails <input type="checkbox"/> Reconcile the bank accounts <input type="checkbox"/> Schedule staff into simpro/Fergus <input type="checkbox"/> Importing of wholesales invoices | <ul style="list-style-type: none"> <input type="checkbox"/> Check Dropbox <input type="checkbox"/> Check Emails <input type="checkbox"/> Reconcile the bank accounts <input type="checkbox"/> Schedule staff into simpro/Fergus <input type="checkbox"/> Importing of wholesales invoices | <ul style="list-style-type: none"> <input type="checkbox"/> Check Dropbox <input type="checkbox"/> Check Emails <input type="checkbox"/> Reconcile the bank accounts <input type="checkbox"/> Schedule staff into simpro/Fergus <input type="checkbox"/> Importing of wholesales invoices | <ul style="list-style-type: none"> <input type="checkbox"/> Check Dropbox <input type="checkbox"/> Check Emails <input type="checkbox"/> Reconcile the bank accounts <input type="checkbox"/> Schedule staff into simpro/Fergus <input type="checkbox"/> Importing of wholesales invoices | <ul style="list-style-type: none"> <input type="checkbox"/> Check Dropbox <input type="checkbox"/> Check Emails <input type="checkbox"/> Reconcile the bank accounts <input type="checkbox"/> Schedule staff into simpro/Fergus <input type="checkbox"/> Importing of wholesales invoices |
| Morning Tea | | | | |
| <ul style="list-style-type: none"> <input type="checkbox"/> Debt collection <input type="checkbox"/> Client phone calls, queries and client bookings <input type="checkbox"/> Enter wholesalers invoices <input type="checkbox"/> Check emails | <ul style="list-style-type: none"> <input type="checkbox"/> Time Sheets checked to GPS Reports. Wages into Payroll. <input type="checkbox"/> Client phone calls, queries and client bookings <input type="checkbox"/> Genesis invoices & queries | <ul style="list-style-type: none"> <input type="checkbox"/> Finalise Wages <input type="checkbox"/> Client phone calls, queries and client bookings <input type="checkbox"/> Chase Wholesaler invoices & credits | <ul style="list-style-type: none"> <input type="checkbox"/> Debt collection <input type="checkbox"/> Client phone calls, queries and client bookings <input type="checkbox"/> Check emails <input type="checkbox"/> Quoting | <ul style="list-style-type: none"> <input type="checkbox"/> Client phone calls, queries and client bookings <input type="checkbox"/> Enter wholesalers invoices <input type="checkbox"/> Check emails <input type="checkbox"/> Shredding |
| Lunch | | | | |
| <ul style="list-style-type: none"> <input type="checkbox"/> Customer invoicing, Scanning COC's and attaching piecing things together, incoming and outgoing mail <input type="checkbox"/> Check emails <input type="checkbox"/> Check calendar and phone or text reminder to clients of their booked appointment. | <ul style="list-style-type: none"> <input type="checkbox"/> Customer invoicing, Scanning COC's and attaching piecing things together, incoming and outgoing mail <input type="checkbox"/> Check emails <input type="checkbox"/> Check calendar and phone or text reminder to clients of their booked appointment. | <ul style="list-style-type: none"> <input type="checkbox"/> Enter wholesaler invoices <input type="checkbox"/> Customer invoicing, Scanning COC's and attaching piecing things together, incoming and outgoing mail <input type="checkbox"/> Chase missing receipts <input type="checkbox"/> Check calendar and phone or text reminder to clients of their booked appointment. | <ul style="list-style-type: none"> <input type="checkbox"/> Customer invoicing, Scanning COC's and attaching piecing things together, incoming and outgoing mail <input type="checkbox"/> Chase missing receipts <input type="checkbox"/> Check calendar and phone or text reminder to clients of their booked appointment. | <ul style="list-style-type: none"> <input type="checkbox"/> Office Files Backup <input type="checkbox"/> Tidy and Clean office <input type="checkbox"/> Filing <input type="checkbox"/> Customer invoicing, Scanning COC's and attaching piecing things together, incoming and outgoing mail <input type="checkbox"/> Quoting <input type="checkbox"/> Check emails <input type="checkbox"/> Check calendar and phone or text reminder to clients of their booked appointment. |

Monthly Or Yearly Checklist

Monthly Tasks

- Payables statements reconcile to Xero
- Receivable statements (with debt collection and reconciling Xero to SimPRO) Client phone calls and checking emails moved to afterwards using customer invoicing time.
- Vehicle maintenance, registrations, WOF's, services and road users and maintaining GPS system.
- Stationary shopping
- Clean up old computer files and Simpro leads.
- Job schedule to check to kitchens received.
- GST preparation, checking and filing. Due 15 January 2017 next and then 28th February 2017 and every 2 months thereafter.

Bi Monthly Tasks

-

Quarterly Tasks

- Liase with accountant and gather information for accountant

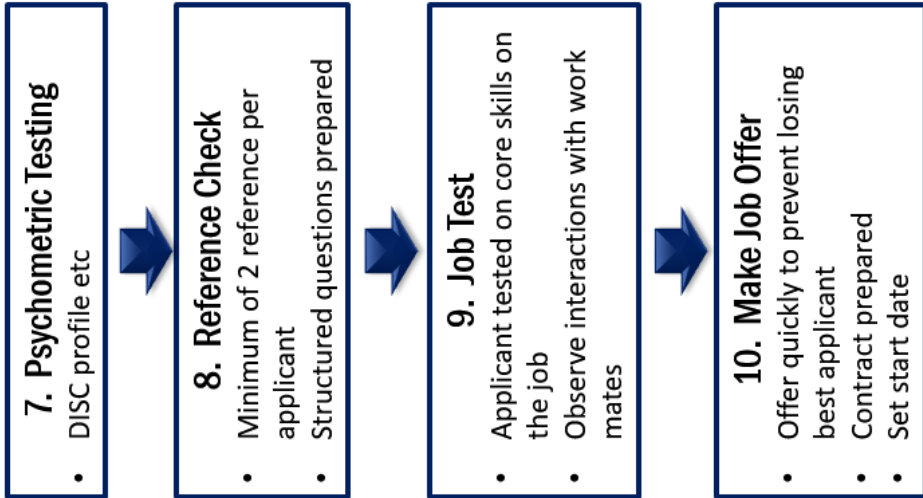
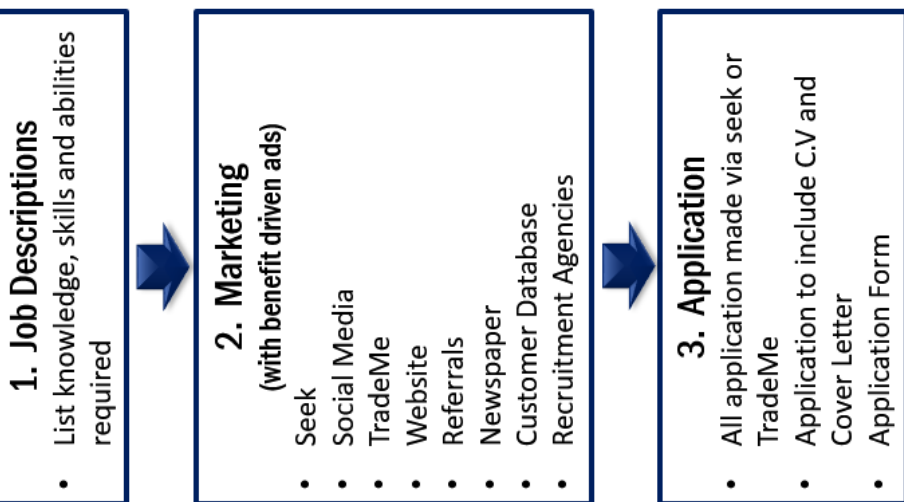
Annual Tasks

- ACC

Hiring Process

PROFITABLE
TRADIE.

Staff Hiring Process



Telephone Interview

PROFITABLE
TRADIE.

Name of Applicant:

Phone Number:

Hi,

- It's (your name) from XYZ Plumbing calling about the Office Manager Position that you applied for.
- Do you have ten minutes of your time for a phone interview?
- How are you today?
- I have a few questions for you today. After this interview we are running a face-to-face interview for the successful applicants. We'll advise you about that in the next couple of days.

5 Key Traits of a Successful Office Manager – Phone interview questions (screening interview)

Proactiveness – Prior research into what XYZ Plumbing does. Prep for the interview.

Rating: ____/5

Tell me about your understanding of what we do and what the role involves?

Personality / Achievement Driven – Are they good with people, especially under pressure? Are they driven to high achievement?

Rating: ____/5

Tell me about one of your accomplishments or successes that you are really proud of, whether it be at work, university or sports / cultural? What made you successful in that situation?

What are your strengths? What specific actions lead to your success?

Work ethic / Stick ability / Initiative

Rating: ____/5

Tell me about a situation where you have been given a task or project that you weren't sure how to complete. What did you do to achieve a successful result? What would you learn and what would you do differently next time?

What are your weaknesses?

Interview – Writing & Number Test

PROFITABLE
TRADIE.

You have 25 Minutes to Complete These Tests.

1. Please answer the following questions (without a calculator):

- a. Write $\frac{3}{4}$ as a decimal and as a percentage?
75%
- b. What is 20% of 2600?
520
- c. How many square meters are there in a room 10m x 5m?
50
- d. What is the Capital of Australia?
Canberra

2. Please rewrite this excerpt from a piece of marketing material for a building company. The title of the ebook was "10 Secrets Owners of Recently Built Homes Wish they Knew Prior to Signing their Building Contract."

This exercise is designed to test your ability to write clearly using appropriate grammar and spelling.

"New Home Building is a purchase unlike most others. Where you can have a choice on the outcome. It takes longer than most other purchasing transactions and therefore the ability for the client and the contractor to be compatible is even more important.

It is the largest purchase that most people will undertake in their lives and therefore having trust and assurance from those performing the creation of your home is important.

It is the venue for spending a good part of your life entertaining friends and family and more importantly it is home to the family where memories are created and cherished. It is important that one takes the time in having an input into creating an environment in which they can call home. The beauty about creating a new home is simply that you have the opportunity to have input into creating a home and it doesn't become just another house.

This is the basis of Welcome Homes and what we stand for. We are a Waikato based independent home construction company that is not owned by a franchisor who wants volumes of homes done in the shortest period possible. We build a few homes for clients who want their input into their creation and using our methods and systems they don't have to spend a fortune doing so."

Pre Job Checklists

PROFITABLE
TRADIE.

Pre-Job Checklists

The purpose of this checklist is to ensure that the builder / project is ready for us when they say they are. It costs us a lot of money, time and hassle to have repeat visits to site which are not planned for.

Please ensure that you check with the site manager / project manager / owner (person in charge of the project) at least two days prior to our start date. It is vital that you ask the site manager all the questions on the checklist as missing even one small item can cause repeat visits at our end.

Here is the script to use:

"Hi (site manager). (Your name) from XYZ Electrical here. How's it going? Just calling about the job at (address of project). We've got the (Project stage) scheduled for (date and time). I wanted to check in and make sure everything is good to go at your end? Can I run through our pre-job checklist with you?"

Run through the appropriate checklist...

"Cool (site manager). That's all good. We'll see you on (date and project site)."

Or

"Ok (site manager), we need the (name the items to be completed) finished before we come. When do you plan to have (name the items to be completed) finished? Cool. We'll reschedule for then. I'll give you a bell on (name the day) to check in and confirm the date."

Pre Job Checklists

PROFITABLE
TRADIE.

Insert Logo here

Pre Pipe and Fit off Checklist

| | |
|---------------------------|----------------------------|
| Project: | Date work to be completed: |
| Date checklist completed: | Completed by: |

| | Pre Pipe | <u>Ready</u> | <u>Not Ready</u> | <u>Notes</u> |
|---|---|--------------|------------------|--------------|
| 1 | Have all ceiling battens been installed? | | | |
| 2 | Are the kitchen and laundry marked out on the floor? | | | |
| 3 | Will all the fixtures and tapware be ready on site or will they be arriving on the date this visit is scheduled for? | | | |
| 4 | What is the pink bat installation date? | | | |
| 5 | Book a date and time for a walk through at least two days before this to organise deliveries, penetrations, hose taps and gas sleeves (if applicable) | | | |

Notes, comments:

| |
|--|
| |
|--|

Quality Assurance Checklists

**PROFITABLE
TRADIE.**

Insert Logo here

Pre Pipe and Fit off Checklist

| | |
|---------------------------|----------------------------|
| Project: | Date work to be completed: |
| Date checklist completed: | Completed by: |

| | Fit off | <u>Ready</u> | <u>Not Ready</u> | <u>Notes</u> |
|---|--|--------------|------------------|--------------|
| 1 | Have the kitchen and laundry been installed 100%? | | | |
| 2 | Have the holes been drilled in the stone bench tops? (if applicable) | | | |
| 3 | Have all the vanities been installed? | | | |
| 4 | Are all of the showers installed? | | | |
| 5 | Has all of the tiling and/or vinyl laying been complete 100% | | | |
| 6 | Has all the painting been completed? | | | |
| 7 | Ensure appropriate overlap with Electrician | | | |
| 8 | What date is the carpet installation booked for (all fit off plumbing must be complete before this date) | | | |

Notes, comments:

Pre Job Checklists

PROFITABLE
TRADIE.

Pre-Job Checklists

The purpose of this checklist is to ensure that the builder / project is ready for us when they say they are. It costs us a lot of money, time and hassle to have repeat visits to site which are not planned for.

Please ensure that you check with the site manager / project manager / owner (person in charge of the project) at least two days prior to our start date. It is vital that you ask the site manager all the questions on the checklist as missing even one small item can cause repeat visits at our end.

Here is the script to use:

"Hi (site manager). (Your name) from XYZ Electrical here. How's it going? Just calling about the job at (address of project). We've got the (Project stage) scheduled for (date and time). I wanted to check in and make sure everything is good to go at your end? Can I run through our pre-job checklist with you?"

Run through the appropriate checklist...

"Cool (site manager). That's all good. We'll see you on (date and project site)."

Or

"Ok (site manager), we need the (name the items to be completed) finished before we come. When do you plan to have (name the items to be completed) finished? Cool. We'll reschedule for then. I'll give you a bell on (name the day) to check in and confirm the date."

Pre Job Checklists

PROFITABLE
TRADIE.

Insert Logo here

Pre Wire, 2nd Visit and Fit off Checklist

| | |
|---------------------------|----------------------------|
| Project: | Date work to be completed: |
| Date checklist completed: | Completed by: |

| | Pre Wire | <u>Ready</u> | <u>Not Ready</u> | <u>Notes</u> |
|---|---|--------------|------------------|--------------|
| 1 | Have all ceiling battens been installed? | | | |
| 2 | Are the windows in?(lockable) | | | |
| 3 | What's the location of the Gas Infinity? | | | |
| 4 | Are the kitchen plans available? | | | |
| 5 | Do you know the vanity location and sizes | | | |
| 6 | Is the property manager, builder or home owner available for a walk around (day of or day before) "first thing" | | | |
| | 2nd Visit. Not always (for cutting downlight Fan Grills etc) | | | |
| | Is the Gjb up? | | | |

Notes, comments:

| |
|--|
| |
|--|

Quality Assurance Checklists

**PROFITABLE
TRADIE.**

Insert Logo here

Pre Wire, Fit off & Final Checklist

| | |
|---------------------------|----------------------------|
| Project: | Date work to be completed: |
| Date checklist completed: | Completed by: |

| | Final Checklist | <u>Ready</u> | <u>Not Ready</u> | <u>Notes</u> |
|----|---------------------------------------|--------------|------------------|--------------|
| 1 | Turn on all circuits | | | |
| 2 | All power points are live | | | |
| 3 | All lights work | | | |
| 4 | All light switches operate correctly | | | |
| 5 | Sensor light operates correctly | | | |
| 6 | Bathroom fans operate correctly | | | |
| 7 | Heated towel rails get hot | | | |
| 8 | Rangehood operates | | | |
| 9 | Hot water cylinder is drawing current | | | |
| 10 | Oven and hob operate | | | |
| 11 | Testing as required | | | |
| 12 | Walk through & ensure everything | | | |
| 13 | Test alarm works/sirens go | | | |
| 14 | Make alarm code 3 digit house number | | | |
| 15 | No small bits of wire on floor | | | |
| 16 | All rubbish has been cleaned up | | | |

Plumbing Inspection Checklist

PROFITABLE
TRADIE.

Plumbing Inspection Checklist for XYZ Plumbers Ltd

| | |
|-----------------------|----------------|
| Client Name: | Plumber: |
| Client Address: | Job #: |
| Phone No.: | Date: |

1. **Toby Location** (please note so owner(s) is/are aware in case of emergency)

.....

2. **Water Main**

Type.....

| | | | |
|--------------------|--------------|---------|------|
| Condition (circle) | Needs Repair | Average | Good |
|--------------------|--------------|---------|------|

3. **Hot Water System**

Type..... Age (approx.).....

| | | | |
|--------------------|--------------|---------|------|
| Condition (circle) | Needs Repair | Average | Good |
|--------------------|--------------|---------|------|

| | | | |
|-----------------------------|--------------------|-----------------------|----------------|
| Estimate Life Span (circle) | Less than 6 months | 6 months to 12 months | 12 Months plus |
|-----------------------------|--------------------|-----------------------|----------------|

Is there a tempering valve? Y / N

4. **Tap Ware**

Leaks? Y / N Where?

.....

Stiff Loose Taps? Y / N Where?

.....

Mixer required? Y / N Where?

Plumbing Inspection Checklist

5. **Water Leaks** (Check for slow leaks)

Kitchen... Y / N Laundry Y / N

Bathroom... Y / N Toilet Y / N

6. **Roof** (Visual Inspection only)

Spouting/ Gutter Needs repair Average Good

What needs repairing:.....

Roof Condition Needs inspection Average Good

What needs inspecting:.....

Down Pipes Needs repair Average Good

What needs repairing:.....

7. **Drains**

Drains clear? Y / N

What needs attention:.....

8. **Ventilation**

Range Hood ventilates to exterior Y / N

Bathroom fan ventilates to exterior Y / N

9. **Gas**

Does the property have gas? Y / N

Gas Appliances

Water Heater Make.....Model.....Need Servicing Y / N

Hob Make.....Model.....Need Servicing Y / N

Oven Make.....Model.....Need Servicing Y / N

Heater Make.....Model.....Need Servicing Y / N

Electrical Inspection Checklist

PROFITABLE
TRADIE.

Electrical Inspection Checklist for XYZ Electrical Ltd

| | | | |
|-----------------------|--|--------------------|--|
| Client Name: | | Electrician: | |
| Client Address: | | Job #: | |
| Phone No.: | | Date: | |

1. **Earth Location** (please note so owners is aware in case of emergency)

.....

2. **Switch Board**

Type (Take Photo) RCD's / upgrade / required? Y / N

| | | | |
|--------------------|--------------|---------|------|
| Condition (circle) | Needs Repair | Average | Good |
|--------------------|--------------|---------|------|

3. **Power Points**

| | | | |
|--------------------|--------------|---------|------|
| Condition (circle) | Needs Repair | Average | Good |
|--------------------|--------------|---------|------|

Additional Power Points Required? Y / N Upgrade Singles to Doubles? Y / N

4. **Lights**

Any issues with blown lights? Y / N Upgrade to LED's? Y / N

Security Lights Working Y / N Security Lights Required? Y / N

Additional Lighting Required?

5. **Bathrooms**

Extractor Fan Working / Required Y / N Heater Working / Required Y / N

Heated Towel Rail Working / Required Y / N Towel Rail / Fan / Timer Y / N

6. **Heating and Ventilation**

Ventilation Filters Due for Replacement Y / N Ventilation System Required Y / N

Heat Pump Due for Service Y / N Heat Pump Required Y / N

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 6 System Hacks



Systems Bootcamp

Action Steps

Backburners

Rules Of The Game

Tradies RULES OF THE GAME:

PROFITABLE
TRADIE.

- Rule 1:** Hours of Work: Minimum 8.00am to 5.00pm Monday to Friday. Inform your employer if you are leaving your job earlier or in later than start time and times above. i.e. to go to the dentist, doctor etc. Be Punctual!
If planning to be off work please give your employer 1 week's notice in advance.
- Rule 2:** To have time sheets on site and filled in daily at the job. They are to be returned to the office at the end of each day.
- Rule 3:** Start time and finishing times to be correct. Make sure times are correct when moving from job to job.
Any discrepancy in timesheets will be seen as misconduct.
- Rule 4:** To have 15 minutes smoko in the morning and in the afternoon and 30 minutes for Lunch. Travelling to buy lunch is required to be within the 30 minute break. The smoko and lunch breaks are to be at 10.00am to 10.15am, Lunch 12.30 -1.00pm, 3.00pm to 3.15pm. Unless special circumstances i.e. pouring concrete, delivery of materials etc. Lunch will be deducted each day so if you choose not to have it you still will not be paid.
- Rule 5:** No smoking during working time. If smoking during your break please smoke outside.
- Rule 6:** To wear protective safety boots.
- Rule 7:** Limit personal phone calls during working hours.
- Rule 8:** At the end of the day clean your work site. This includes your lunch rubbish.
- Rule 9:** Produce quality work.
- Rule 10:** Respect your team mates.
- Rule 11:** If asked to do something by the owner do it as a matter of priority. Do not put it off.
- Rule 12:** If wanting to purchase tools/plumbing materials on ____ account for yourself you must ask the owner first. Order number is required.
- Rule 13:** All materials purchased for a job must have an order number.
- Rule 14:** Any broken tools need to be reported and handed to Neal not used, as this will cause more damage. Do not misuse company tools. They are to be cleaned after use if needed.
- Rule 15:** No alcohol or drug use – Instant dismissal.
- Rule 16:** Respect company vehicles and report any damage immediately. You must pay for any fine you get while using the company vehicle.
- Rule 17:** Company vehicles are to be cleaned weekly in own time.
- Rule 18:** Workshop/shed area to be kept tidy at all times.
Put pipe away behind shed.
All fittings to be put in shed.
Cardboard boxes to be flattened correctly and stacked tidily against red bin.
All rubbish in bin.
- Rule 19:** Do not throw out fittings, pipe clips, scrap etc. when cleaning out vans – sort through before dumping in Bin.
- Rule 20:** If you have a problem, **DO** talk to us so we can sort it out!

Performance Reviews

PROFITABLE
TRADIE.

Performance Review Template

Employee Name: _____

Job Role: _____

Date of Review: _____

Manager's Name: _____

Procedures

1. The employee is to complete the evaluation form prior to meeting (except the section that applies to the Manager).
2. The Manager is to complete the evaluation form prior to meeting.
3. The Manager and employee discuss, review and add final comments during the meeting.
4. The Manager and employee sign off the final copy and attach to employee job file.

Time Management

| | |
|---|----------|
| Arrives on time, takes appropriate breaks, completes full week's work, completes work in a reasonable time frame, limits time spent on personal calls/text etc. | Comments |
| <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Unacceptable <input type="checkbox"/> Not Applicable | |

Appearance

| | |
|---|----------|
| Wears clean and tidy uniform with pride, personal appearance and hygiene is good. | Comments |
| <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Unacceptable <input type="checkbox"/> Not Applicable | |

Performance Reviews

Quality

| | |
|---|----------|
| All/jobs tasks are completed to plan/standard, fixes mistakes without complaint, has a clear understanding of job before beginning. | Comments |
| <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Unacceptable <input type="checkbox"/> Not Applicable | |

Attitude

| | |
|---|----------|
| Has a positive attitude, assesses problems and find appropriate solutions, adheres to health and safety requirements. | Comments |
| <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Unacceptable <input type="checkbox"/> Not Applicable | |

Politeness / Respectfulness

| | |
|---|----------|
| Is courteous to clients, neighbours, other staff, helpful to contractors, uses appropriate language. | Comments |
| <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Unacceptable <input type="checkbox"/> Not Applicable | |

Incentive Program

PROFITABLE
TRADIE.

Team Incentive Program Template

Employee Name: _____

Date: _____

Rate 1-5 (1 = poor, 3 = OK, 5 = excellent)

Time Management

Arrives 5 minutes early and leaves after work is finished _____

Takes appropriate breaks _____

Completes a full weeks work _____

Completes tasks in reasonable timeframe _____

Limits time spent on personal calls / texts etc. _____

Appearance

Wears a clean and tidy uniform with pride _____

Personal appearance and hygiene is good _____

Quality

All tasks / jobs are completed as per plans or standard _____

Fixes any mistakes quickly and without complaint _____

Ensure he has a clear understanding of instructions before beginning a job or task _____

Attitude

Turns up with a positive can do attitude _____

Assesses problems, discusses options and finds appropriate solutions _____

Adheres to Health & Safety requirements _____

Politeness / Respectfulness

Is courteous to clients and neighbours _____

Is helpful to other Contractor's on project sites _____

Uses appropriate language on site _____

Total _____

If you score above 78 you will receive a cash bonus of \$200 cash

If you score between 69 & 78 you will receive a bonus of \$150 ITM voucher

If you score between 59 & 68 you will receive a bonus of \$50 ITM voucher

If you score below 51 you owe the company team fund \$100

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 7 *Guest Speaker – Mike Allsop*



Systems Bootcamp

Notes

A series of horizontal dashed lines for writing notes, filling most of the page.

Notes

A series of horizontal dashed lines for writing notes.

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 8 *Building Your Plan*



Systems Bootcamp



Systems

| | Start | 30 Days | 90 Days | 1 Year | Onsite |
|------------------------------|-------|---------|---------|--------|---|
| A to Z of Operations | | | | | Equipment / Tool Management System |
| Job Management Systems | | | | | Operations Manual |
| Administration manual | | | | | On-Line Job Cards |
| "Cloud" Accounting system | | | | | Job cards |
| Code of Conduct | | | | | Handover checklist |
| Email Templates | | | | | Online Job Cards |
| Pre-Job Checklists | | | | | Task Analysis (who, what, when) |
| Quality Assurance Checklists | | | | | Hand Over Checklist |
| Team Induction Checklist | | | | | Sub-Contractor Hand Over Checklist |
| Health and Safety Program | | | | | Training Videos for Office Process (JING) |



Team

| | Start | 30 Days | 90 Days | 1 Year | |
|------------------------------------|-------|---------|---------|--------|--|
| Core Values | | | | | |
| Code of Conduct | | | | | |
| Job Descriptions | | | | | |
| Employment Agreements | | | | | |
| KPI's (Key Performance Indicators) | | | | | |
| Hiring Process | | | | | |
| Interview Scripts | | | | | |
| Unique Hiring Proposition | | | | | |
| DISC Profiling | | | | | |
| Vision Statement | | | | | |
| Mission Statement | | | | | |
| Team Culture | | | | | |
| Team Fun Days / Social Club | | | | | |
| Performance Reviews | | | | | |
| Organisational Chart | | | | | |
| Suggestions Box | | | | | |
| Incentive Program | | | | | |
| Job Advertisement | | | | | |



Leadership

Start
30 Days
90 Days
1 Year

| | | | | |
|-------------------------------------|--|--|--|--|
| Default Diary | | | | |
| Personal Development | | | | |
| Delegate and Outsource | | | | |
| Business Strategy | | | | |
| Vision Book | | | | |
| Milestones | | | | |
| Develop strong leaders | | | | |
| Business KPI's | | | | |
| 90-day plan | | | | |
| SMART goals | | | | |
| Time Productivity | | | | |
| Scheduling Tools | | | | |
| Recognise longevity and performance | | | | |
| Self-Directed Learning | | | | |
| Implement Staff Suggestions | | | | |
| 80/20 Rule | | | | |
| Stop-Doing List | | | | |
| Exit Strategy | | | | |



Numbers

Start
30 Days
90 Days
1 Year

| | | | | |
|--|--|--|--|--|
| Price for Profit | | | | |
| Use Margin not Mark-Up | | | | |
| Monthly Profit and Loss | | | | |
| Key Performance Indicators | | | | |
| Break Even Point (Weekly, Monthly, Yearly) | | | | |
| Set Minimum Gross Profit Margin | | | | |
| Cash Flow Forecast | | | | |
| Sales Budget | | | | |
| Unit or Set Pricing | | | | |
| Minimum Service Charge | | | | |
| Review Pricing Strategy | | | | |
| Terms of Trade | | | | |
| Accounts Receivable Process | | | | |
| Credit Card Payments | | | | |
| Take Bigger Deposits | | | | |
| Pay Yourself First | | | | |
| "Sack" C & D Clients | | | | |
| Improve Invoicing Time | | | | |

The Game Plan

The Game Plan

Date:

Name:

| | Projects | Actions | Tools |
|---|----------|---------|-------|
| 1 | | | |
| 2 | | | |
| 3 | | | |

Notes

Highly Recommended Reading List For improving your results

| | Topic | Title | Author |
|----|---------------------------------|--|---------------------|
| 1 | Networking | Little Black Book of Connections | Jeffrey Gitomer |
| 2 | Systemised Marketing | Never Cold Call Again | Frank Rumbauskas |
| 3 | Marketing Strategies | Getting Everything you can.... | Jay Abraham |
| 4 | Telemarketing | Cold Calling Techniques That Really Work | Stefan Schiffman |
| 5 | Effective Direct Mail | Million Dollar | Allan Pease |
| 6 | Client Retention | Critical Non-Essentials | Dr Paddi Lund |
| 7 | How to.. step by step | Instant Leads | Brad Sugars |
| 8 | Promotions and Referrals | Instant Promotions/Instant Referrals | Brad Sugars |
| 9 | The best marketer in the world. | www.dankennedy.com | Dan Kennedy |
| 10 | Marketing Tactics | Guerrilla Marketing | Jay Conrad Levinson |
| 11 | Promotion | 101 Ways to promote yourself | Raleigh Pinskey |
| 12 | Time Management | NO BS for Entrepreneurs | Dan Kennedy |
| 13 | Marketing systems & examples | Magnetic Marketing | Dan Kennedy |

These are some of the best books and audios I have read and listened to on marketing, and give practical ideas you can implement into your Plumbing or Electrical company to improve your results.